

**[[Insert Name]] County First Steps**

***Partnership Reflection and Planning for 2015-16***

**INSTRUCTIONS (PLEASE READ!)**

**You do not need to turn in this document to SC First Steps**. This template is intended to be a **working document**, as part of a multi-step process involving your partnership board and staff and your SC First Steps Technical Assistant (TA). This process serves three major purposes related to requirements of the new First Steps legislation (Act 287):

1. Review and evaluate partnership performance, and set goals for improvement;
2. Identify priority areas for technical assistance, consultation and support to local partnerships; and
3. Provide input to the SC First Steps strategic planning process.

**Relevant sections of Act 287:**

**SECTION 10. Section 59‑152‑50**

(2) review the local partnerships’ plans and budgets in order to provide technical assistance and recommendations regarding local grant proposals and improvement in meeting statewide and local goals;

(3) provide technical assistance, consultation, and support to local partnerships to facilitate their success including, but not limited to, model programs, strategic planning, leadership development, best practice, successful strategies, collaboration, financing, and evaluation;

**SECTION 12. Section 59‑152‑70**

(F) As a condition of receiving state funds, each local partnership must be subject to performance reviews by South Carolina First Steps, including, but not limited to, local board functioning and collaboration and compliance with state standards and fiscal accountability.

**SECTION 19. Section 59‑125‑160**

(A) The South Carolina First Steps to School Readiness Board of Trustees shall establish internal evaluation policies and procedures for local partnerships for an annual review of the functioning of the partnership, implementation of strategies, and progress toward the interim goals and benchmarks.

**Step 1: Initial Partnership Review (April 29 – your partnership’s interview date)**

Review this document and be prepared to respond to these questions during your partnership interview (Step 2). You are encouraged to use bullets, numbered lists, etc. to “take notes” using this template. We strongly encourage you to seek input from board members, staff, vendors, and other partners.

The sections of this document include:

Part 1: Overall Partnership Performance (since inception)

Part 2: Continuing Strategies for FY16

Part 3: New Strategies for FY16

Part 4: Partnership Standards (Governance, Resource Development, and Fiscal/Operations)

Part 5: Input to the First Steps Strategic Plan:

Meeting Local Needs of Children 0-5

Implementing Local Partnership Core Functions

Each question provides a list of resources you should use to help answer the questions – these resources include:

* Renewal plans and review results from last year (2014-15) and this year (2015-16)
* *2014-15 Strategy Performance Standards and Data Sources* document (emailed to you, and on web site)
* *2015-16 First Steps Partnership and Program Accountability Standards* (emailed to you, and on web site)
* Your partnership’s last *Vision Toolkit* (2011-12) as well as your partnership’s most recent needs and resources assessment update
* Resources provided by the external evaluator (Compass):
  + *County Profile* (you received via email from Compass; contact your TA if you need it re-sent)
  + Demographic data packet (received at 11/20/2014 ED meeting, re-sent with this document)

Your DRAFT *Partnership Reflection and Planning* document will serve as preparation for your partnership’s Technical Assistance Interview (Step 2). **Again, you will not have to turn in this document to SC First Steps.**

**Step 2: Interview by SC First Steps Staff and Board (May 25 – July 31)**

Your TA, along with one or more additional SCFS staff and/or state board representatives, will schedule a time to have an in-depth conversation about your partnership’s achievements, challenges, future plans and technical assistance needs. Questions from this *Partnership Reflection and Planning* document will provide the basis for discussion, as well as results from the review of your partnership’s FY16 Renewal Plan. Ideally, this conversation will take place at a **site visit** to your partnership, though individual calls/webinars may be scheduled if an in-person visit isn’t possible. Interviews will be scheduled starting the last week of May, through July 31. Allow approximately **3 hours** for the interview. At minimum, the ED and at least one local board member must be present. We strongly encourage additional local board members to attend; partnership and vendor staff may attend as well, at your discretion.

During your interview, plan to address questions regarding overall partnership performance (Section 1), any new strategies for FY16 (Section 3), Governance (Section 4) and Input to the Strategic Plan (Section 5). **There will likely not be enough time during the interview to cover the questions in Section 2 (Continuing Strategies) for ALL of your partnership’s strategies.** Please prioritize any issues or concerns that your partnership would like to discuss, and the interview team will do so as well.

Your TA will use the *Partnership Reflection and Planning* template to take notes during the interview and provide additional feedback, and will return the document to you via email. Your partnership board, staff and partners will use this document to develop DRAFT Priority Goals for 2015-16 (Step 3). SCFS staff will use the document internally to prioritize technical assistance activities and summarize partnerships’ input on strategic planning for consideration by the SCFS Board of Trustees.

**Step 3: DRAFT Priority Goals (by August 31)**

Use your partnership’s updated *Partnership Reflection and Planning* document, provided to you by your TA, to select priority goals for your local partnership for 2015-16. Your goals should be based on issues identified as “challenges” during Steps 1 and 2 of this process. It is important to select a manageable number of goals; therefore, you may not be able to address every challenge this year. Prioritize your goals based on:

* Issues of non-compliance with program standards
* Issues of non-compliance with partnership standards (governance, fiscal, operations, etc.)
* Identifying and serving children and families most at-risk
* Increasing access and/or improving quality of services

Using the *Priority Goals* template, draft a manageable number of goal statements (est. 5), along with measureable objectives that will demonstrate achievement, or progress toward achievement, of each goal. Submit your draft goals to your TA via email, who may add additional goals or suggest changes.

**Step 4: Local Board Approval of Priority Goals (by September 30)**

Once your TA has reviewed your goals and objectives for 2015-16, bring the *Priority Goals* document to your full board for discussion and adoption. The TA staff will attempt to fulfill any requests to attend board meetings in-person or by phone. Once voted on and approved, return the signed *Priority Goals* document to SC First Steps per the instructions, along with the associated board minutes. Your partnership’s adopted priority goals will serve as your partnership’s CQI Plan, per SC First Steps Program and Partnership Accountability Standards, as well as part of future annual performance reviews of your partnership, per Act 287.

**[[Insert Name]] County First Steps**

**Part 1: Overall Partnership Performance**

|  |
| --- |
| **1A. Partnership Successes (Overall)** |
| 1. **What were your partnership’s most significant achievements in 2014-15?** |
|  |
| 1. **When thinking about successes since inception, what have been your most significant achievements in terms of results for children and families? What has been your most successful strategy?** |
|  |
| 1. **When thinking of recent successes and those noted since inception, WHY do you believe you were successful? What were the conditions that made your partnership successful in these areas?** |
|  |
| 1. **When looking ahead, how are you using the conditions of past achievements to plan for your future success?** |
|  |
| **1B. Partnership Challenges (Overall)** |
| 1. **Describe the biggest challenge your partnership faced in 2014-15.** |
|  |
| 1. **Think about challenges you have encountered since inception – list 2-3 that stand out as most significant.** |
|  |
| 1. **When thinking of challenges you have faced, can you name one challenge that you have turned into an opportunity? What were the results?** |
|  |
| 1. **Thinking back on challenges that you have noted above, what would you say are the underlying issues that caused these challenges? What steps have you taken, or ideas you have for overcoming these challenges?** |
|  |

**Part 2: Continuing Strategies**

**For strategies implemented in 2014-15 that will be continued in 2015-16.**

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| --- |
| **EXISTING STRATEGY NAME**  **STRATEGY PROGRAM CODE** |
| **For how many years has your partnership operated this strategy?** |
| **years** |
| **List the current vendor(s) for this strategy.** |
|  |
| **2A. Strategy Implementation** |
| 1. **Briefly describe this strategy as implemented in FY15. What were your partnership’s goals and objectives for this strategy during 2014-15?** |
|  |
| 1. **How does this strategy integrate with other strategies and activities of your local partnership?** |
|  |
| 1. **Who are the partners and collaborators for implementing this strategy, and what are their roles?** |
|  |
| 1. **STRATEGY SUCCESSES: What were your greatest successes with implementing this strategy in 2014-15? Consider the following:**  * **Fidelity to the chosen program model(s) used in the strategy** * **Fidelity to First Steps Program Standards for this strategy.\*\* If First Steps standards do not exist for this strategy, refer to the “Other Strategy” standards.** * **Implementing what was proposed in the partnership’s 2014-15 Renewal Plan** * **Board, staff, and partners/collaborators that contributed to strategy success**   **\*\*Refer to the document, *2014-15 Strategy Performance Standards and Data Sources* for a list of data points, by strategy.**   * **Meeting or exceeding OUTPUT objectives: numbers served, activities performed, services provided** * **Meeting or exceeding OUTCOME objectives: pre-to-post improvement on assessments, surveys, etc. and positive changes in client behavior, per the program and the model** |
|  |
| 1. **STRATEGY AREAS NEEDING IMPROVEMENT: In what areas did your strategy experience challenges in 2014-15? Consider the following:**  * **Areas the strategy fell short implementing the program with fidelity to the chosen model(s)** * **Challenges with fidelity to First Steps Program Standards for this strategy.\*\* If First Steps standards do not exist for this strategy, refer to the “Other Strategy” standards.** * **Areas you fell short adhering to what was proposed in your partnership’s 2014-15 Renewal Plan** * **Board, staff or partners/collaborators that presented challenges to implementation**   **\*\*Refer to the document, *2014-15 Strategy Performance Standards and Data Sources* for a list of data points, by strategy.**   * **Not meeting OUTPUT objectives: did not serve as many clients or provide as many activities and/or services as expected** * **Not meeting OUTCOME objectives: did not see expected pre-to-post gains on assessments, surveys, etc. or see sufficient positive changes in client behavior, per the program and the model**   **Why did these challenges occur? What changes are you implementing, or plan to implement, to address these issues?** |
|  |
| 1. **LONG-TERM STRATEGY PERFORMANCE: Combine FY15 performance data with your County Profile from the external evaluators (Compass), which provides summary data for this strategy from FY11-FY14. Also look at your performance history with this strategy (conditional approvals, etc.) over the same five-year period.**   **Is this strategy achieving the results your partnership intended, over the past five years? What trends are you seeing with your strategy performance? What are you doing well, and what needs to be improved?** |
|  |
| 1. **CHANGES FOR FY16: What changes are you planning to make to this strategy for 2015-16, and why? What are your FY16 goals and objectives for this strategy, and how have they changed from 2014-15?** |
|  |
| **2B. Strategy Alignment with Local Needs and Resources** |
| 1. **SERVING THE MOST AT-RISK CHILDREN AND FAMILIES WITHIN THIS STRATEGY: How effective were you in using this strategy during 2014-15 to target and serve children and families at high risk, across all risk factors prioritized by First Steps? What collaborations and referral sources do you have in place currently that help this strategy find and serve at-risk children and families?**   **What additional collaborations do you need to establish or improve to make this strategy more successful?** |
|  |
| 1. **INCREASING ACCESS FOR CHILDREN AND FAMILIES: What is the availability of programs and services similar to this strategy, in your county? Has access improved, or gotten worse, in your county since the last Vision Toolkit (2011-12)?**   **How do you collaborate with these programs and services to ensure high risk children are connected to the services they need (i.e., refer clients, share waiting lists, universal staffing, joint services, transition services as children age out of programs, etc.)?**  ***Child Care and Early Ed Strategies: The data packet from Compass includes several pages of community-based information on availability of child care and preschool programs.*** |
|  |
| **2C. Strategy Alignment with School Readiness Outcomes** |
| 1. **SCHOOL READINESS OUTCOMES:**   **Act 287 defines school readiness as follows:**  **‘School readiness’ means the level of child development necessary to ensure early school success as measured in the following domains: physical health and motor skills; emotional and social competence; language and literacy development; and mathematical thinking and cognitive skills. School readiness is supported by the knowledge and practices of families, caregivers, healthcare providers, educators, and communities.”**  **In the coming months, the SC First Steps Board of Trustees will establish goals and benchmarks related to school readiness.**  **South Carolina’s current school readiness assessment, *mCircle*, measures readiness for 4K and 5K children in language and literacy development. Baseline data shows that among high-risk children entering First Steps 4K in Fall 2014, the majority do not meet developmental expectations for letter naming and vocabulary.**  **Answer the following questions:** |
| **How does this strategy supporting children’s language and literacy development?**  (response)  **How does this strategy supporting the state’s definition of school readiness across domains other than language and literacy development?**  (response) |

**COPY/PASTE PART 2 AS NEEDED FOR EACH CONTINUING STRATEGY**

**Part 3: New Strategies**

**Complete the following table for each new strategy for 2015-16. Delete this section if the partnership is not proposing any new strategies.**

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| **NEW STRATEGY NAME**  **STRATEGY PROGRAM CODE** |
| **List the current vendor(s) for this strategy.** |
|  |
| **3A. Strategy Implementation** |
| 1. **Briefly describe this strategy.** |
|  |
| 1. **How will this strategy integrate with other strategies and activities of your local partnership?** |
|  |
| 1. **Who are the partners and collaborators for implementing this strategy, and what will their roles be?** |
|  |
| 1. **GOALS AND OBJECTIVES: What are your partnership’s goals and objectives for this strategy for 2015-16, in terms of:**   **Outputs: numbers served, activities performed, services provided, etc.**  **Outcomes: pre-to-post improvement on assessments, surveys, etc. per program and model standards, or as proposed in your FY16 Renewal Plan.** |
|  |
| **3B. Strategy Alignment with Local Needs and Resources** |
| 1. **MEETING UNMET NEED: What evidence and/or circumstances led your partnership to establish this new strategy? Why did your partnership select this strategy for implementation, i.e., what gap in services does this strategy fill? If this strategy replaces a discontinued strategy, please explain the rationale for discontinuing the previous strategy if favor of this new strategy.** |
|  |
| 1. **SERVING THE MOST AT-RISK CHILDREN AND FAMILIES WITHIN THIS STRATEGY: How do you intend to target and serve children and families at high risk, across all risk factors prioritized by First Steps? What collaborations and referral sources will you have in place to help this strategy find and serve at-risk children and families?**   **What additional collaborations do you need to establish or improve to make this strategy more successful?** |
|  |
| 1. **INCREASING ACCESS FOR CHILDREN AND FAMILIES: What is the availability of programs and services similar to this strategy, in your county? Has access improved, or gotten worse, in your county since the last Vision Toolkit (2011-12)?**   **How will you collaborate with these programs and services to ensure high risk children are connected to the services they need (i.e., refer clients, share waiting lists, universal staffing, joint services, transition services as children age out of programs, etc.)?**  ***Child Care and Early Ed Strategies: The data packet from Compass includes several pages of community-based information on availability of child care and preschool programs.*** |
|  |
| **3C. Strategy Alignment with School Readiness Outcomes** |
| 1. **SCHOOL READINESS OUTCOMES:**   **Act 287 defines school readiness as follows:**  **‘School readiness’ means the level of child development necessary to ensure early school success as measured in the following domains: physical health and motor skills; emotional and social competence; language and literacy development; and mathematical thinking and cognitive skills. School readiness is supported by the knowledge and practices of families, caregivers, healthcare providers, educators, and communities.”**  **In the coming months, the SC First Steps Board of Trustees will establish goals and benchmarks related to school readiness.**  **South Carolina’s current school readiness assessment, *mCircle*, measures readiness for 4K and 5K children in language and literacy development. Baseline data shows that among high-risk children entering First Steps 4K in Fall 2014, the majority do not meet developmental expectations for letter naming and vocabulary.**  **Answer the following questions:** |
| **How will this strategy support children’s language and literacy development?**  (response)  **How will this strategy support the state’s definition of school readiness across domains other than language and literacy development?**  (response) |

**COPY/PASTE PART 3 AS NEEDED FOR EACH NEW STRATEGY**

**Part 4: Partnership Standards**

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| **4A. Board Governance** |
| 1. **What were your partnership board’s most significant achievements in 2014-15?** |
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| 1. **In what areas, if any, did your board experience challenges meeting First Steps governance standards? Why? What changes are you implementing, or plan to implement, to address these issues?**   **Address any of the following: expired terms, vacancies, meeting attendance, engagement/participation, and overall board functioning.** |
|  |
| 1. **Please answer the following questions about board development and training:** |
| **What training and board development activities did your board participate in, in 2014-15?**  (response)  **In what areas is your board most in need of training?**  (response)  **What is your training plan for your board in 2015-16? What resources do you need for board development?**  (response) |
| **4B. Resource Development** |
| 1. **What were your partnership’s most significant achievements in resource development in 2014-15? Refer to your FY16 Renewal Plan responses, as needed.** |
|  |
| 1. **What are your partnership’s greatest challenges with resource development? Refer to your FY16 Renewal Plan responses, as needed.** |
|  |
| 1. **What is the current level of board involvement in resource development?** |
|  |
| 1. **What are your goals for resource development in 2015-16 (refer to your 2015-16 Resource Development Plan as needed)? What resources or training do you need to make your plan successful?** |
|  |
| **4C. Operations and Fiscal Accountability** |
| 1. **What were your partnership’s most significant achievements in this area, in 2014-15?** |
|  |
| 1. **What are your partnership’s greatest challenges in this area? Consider budgeting (BSP, reallocations, etc.), financial reporting and monitoring, contracts and vendor monitoring, human resources, RFM, audit, meeting and documenting 15% match requirement, etc.**   **What resources or training would be most helpful to you?** |
|  |
| 1. **If applicable, please provide explanation for any missed deadlines in 2014-15 for submitting documents to SCFS as required by state law and/or contractual obligation.** |
|  |

**Part 5: Input to the First Steps Strategic Plan**

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| **5A. Meeting Local Needs of Children 0-5**  **Review the packet of needs and resources data by county, provided by the external evaluation team (Compass), as well as other data collected by your partnership’s local needs and resources assessment process. Compare this information to the data collected for your last Vision Toolkit (2011-12).** | |
| 1. **Are statistics for children 0-5 who are at high risk for not being ready for school getting better, or worse in your county? Which statistics have improved the most? Worsened the most? What do you think are the biggest issues facing families with young children in your community?** | |
|  | |
| 1. **Are collaborative partnerships for children 0-5 who are at high risk for not being ready for school getting better, or worse in your county? How do you plan to enhance collaboration overall in 2016 and beyond?** | |
|  | |
| **5B. Implementing Local Partnership Core Functions**  **Per Act 287 SECTION 12. Section 59‑152‑70 (A)(4):**  **Effective July 1, 2016, each partnership’s comprehensive plan shall include the following core functions:**  **(a) service as a local portal connecting families of preschool children to community‑based services they may need or desire to ensure the school readiness of their children;**  **(b) service as a community convener around the needs of preschool children and their families; and**  **(c) support of state‑level school readiness priorities as determined by the State Board** | |
| 1. **When thinking about the three core functions in the new law, in what areas do you think your partnership has been most successful?** | |
|  | |
| 1. **LOCAL PORTAL FOR SERVICES: What is your vision for a “local portal connecting families” for your community? In what role do you see your partnership, relative to other agencies and organizations in your county?** | |
|  | |
| 1. **LOCAL PORTAL FOR SERVICES: How does your partnership connect children, families, and preschool providers to expanded 4K services, including First Steps 4K?** | |
|  | |
| 1. **LOCAL PORTAL FOR SERVICES: How does your partnership connect children, families, and providers to services for health and developmental screenings and the state’s early intervention system (BabyNet)?** | |
|  | |
| 1. **LOCAL PORTAL FOR SERVICES: Describe your partnership’s current activities with regard to:** | |
| Accessibility: Location of your partnership office (is it prominent and accessible), office hours, staffing, availability by phone, email, web site, social media etc. |  |
| First Steps clients: How effective is your partnership with connecting families to needed services? How often do you follow up with families as to their progress? |  |
| Non-First Steps clients: Does your partnership connect families to services who are not served by one of your strategies? If so, how often? |  |
| Support Services: Does your partnership offer support services like Benefits Bank, parent resource center, etc. |  |
| Interagency Collaboration: membership in interagency councils, universal staffing groups, and other collaborations for referring families |  |
| OTHER: Services not mentioned above |  |
| 1. **COMMUNITY CONVENER: What is your vision for a “community convener around the needs of preschool children and their families” for your community? What do you think are the most significant issues facing your county’s preschool children and their families that need a community-wide focus or initiative?** | |
|  | |
| 1. **COMMUNITY CONVENER: What is your partnership already doing or has done recently as a community convener? What activities are you planning for 2015-16?** | |
|  | |
| 1. **SUPPORT FOR STATE SCHOOL READINESS PRIORITIES: What priorities do you think the SC First Steps board should consider as part of the strategic plan?** | |
|  | |